#CARESFORMUSIC

Toolkit Application Worksheet:

PREPARATION

To prepare to use this worksheet, interested applicants should do the following:

1. Review of CARES toolkit and why CARES exists here. www.CARESforMusic.com.
2. Research the distribution of allocated funds that exist today within your area here.
3. Review Definitions for Reference
    a. Requesting Agency
        i. The agency submitting the application for this project.
    b. Allocation Agency of Request
        i. The agency receiving the application for this project.
    c. Beneficiaries
        i. The intended audience served by receiving support or benefits from this project.
    d. Other helpful definitions to comply with industry standards:
        i. Dedicated Music Venues: Venues that exclusively offer music performances.
        ii. Mixed-use Venues: Venues that offer music performances but are also bars or Restaurants.

CHECKLIST

1. Requesting Agency & Contact Information
2. Date of Request
3. Amount requested from Agency of Request
4. Allocation Agency of Request
5. Contact at Allocation Agency of Request
6. Current Amount Allocated to Agency of Request
7. Selection of Key Organizational Project Partners
8. Fiscal Agent of Project
9. Timeline of Project
10. Project Budget & Expenses
11. Purpose of Project

12. Project Title
13. Project Category
14. Program Objectives
15. Max 500 word description of project
16. Major project activities
17. How will you ensure the project is equitable, diverse and inclusive?
18. How will the program be promoted?
19. Who will benefit from this project?
20. Project Performance Metrics and Reporting
21. Attachments to include:
    a. Cover Letter
    b. Letters of Support
    c. Budgets
    d. Resolution Template
    e. Photos, Videos, etc.
    f. Work Samples
    g. Marketing Materials or Graphics for this Project
    h. Previous Marketing Materials or Graphics
22. Eligibility Framework for Beneficiaries

WORKSHEET

This worksheet is designed to serve as a guide or standardized form model that can help communities quickly develop programs that identify gaps to fill for a more holistic and sustainable recovery and meet the needs of the CARES Act eligibility requirements.

1. Requesting Agency & Contact Information
    a. Who is making this request? This agency should be the requesting agency meaning that this agency also serves as the lead point of contact for the allocation agency.
    b. An individual's name, phone number, email, physical address, title, organization, website and any other relevant contact information should be included.
    c. Briefly summarize the mission of your organization and include how it pertains to this particular project.
    d. Briefly summarize the background/history of your organization.
    e. You may also consider including documentation of the fiscal health of your organization.
    f. You may also consider successful programmatic activity examples relative to this project.
2. Date of Request
3. Amount requested from Agency of Request

4. Allocation Agency of Request:
    a. This request should be made to the agency that has received the CARES allocation and is responsible for distributing the funds.
    b. This is often the State, County or City (if applicable), but keep in mind that there could be other partners involved who have been charged with distribution programs.
    c. To determine the appropriate allocation, we suggest doing the following steps in order:
        i. Check the US Department of Treasury Interim Report here.
        ii. Once the agency is located from this list, check with that agency to determine how those funds are further allocated and follow up with those agencies or request an allocation memo to show the breakdown. Sometimes, it is helpful to have state legislators, lobbyists or other government officials inquire on your behalf, if they do not already have these documents themselves.
        iii. **Keep in mind that the amount spent is important once you identify an allocation agency and/or program for your requested funds. Sometimes, the funds have been allocated, but the allocated programs may be in jeopardy of not getting fully spent by the December 30th deadline. This makes an organized and data-supported ask really attractive for those vulnerable funds.**
5. Contact at Allocation Agency of Request:
    a. Who is this request being made to?
        i. Name
        ii. Title
        iii. Contact Information
        iv. Role of Contact to Allocation Agency of Request: Are they the Fiscal Agent, Committee member, Contracted Agent through an MOU to distribute funds, Etc.
6. Current Amount Allocated to Agency of Request:
    a. Numbers pulled from the latest interim report from U.S. Treasury Department: https://home.treasury.gov/system/files/136/Interim-Report-of-Costs-Incurred-by-State-and-Local-Recipients-through-June-30.pdf
7. Selection of Key Organizational Project Partners:
    a. In addition to the Agency of Request, we propose identifying partners to help share responsibilities, outreach and strengthen the project.
    b. Look out for organizations, programs or individuals that are already serving the goals of the project and strive for an application that serves as an umbrella of mission-aligned partners.
    c. Wherever possible, partners should come from a variety of sectors: Public (tourism / economic development, etc.), Private, Non-Profit, Educational, Community Leadership, Existing Committees, Elected Officials & Government Agencies.

            i. There is a point when there are too many partners, so be strategic about a specific function served by each partner and communicate that expectation through the letters of support and table with a very brief description/mission/involvement of the organization.
    d. It is a good idea to include a short (1 page) letter of support from each partner organization.
8. Fiscal Agent of Project
    a. This can be the Agency of Request, or can be a separate entity serving in this role.
    b. Keep in mind that with government agencies, it is helpful to have a fiscal agent that is already registered as a vendor with the allocation agency. Becoming a vendor is a lengthy process, and given the short timeline, you can save a ton of time here by identifying a fiscal agent or Agency of Request that is already a vendor with the Allocation Agency.
    c. Include all contact information for the fiscal agent and note that they are already a vendor with the Allocation Agency with necessary vendor account number, etc.
9. Timeline of Project
    a. Start date should be after March 27, 2020
    b. End date should be on or before December 30, 2020
    c. Include other significant dates of the project, including public events, launch dates, benchmarks and deadlines.
10. Project Budget & Expenses
    a. Consider all costs. Some categories to include are:
        i. Amount of CARES Funding requested from Agency of Request
        ii. Direct Costs presented in a table addressing the following:
            1. Artist Fees
            2. Labor
            3. Operations & Maintenance
            4. Education Costs
            5. Technology
            6. Rent & Utilities
            7. Marketing & Outreach
            8. Salaries & Wages (include title or type of personnel, number of personnel, annual or average salary range, % of time devoted to this project, amount, fringe benefits)
            9. Travel costs (number of travelers, from/to, amount)
            10. Other costs (consultants, advertising, etc.)
        iii. Indirect Costs, if any, presented in a table
        iv. Project Income, if any, presented in a table
            1. Cash for project (description and amount)
        v. In-Kind Project Income, if any, presented in a table (description and amount)

vi. Total Budget Summary presented in a table:
   1. Amount of CARES Funding requested
   2. Total Cost Share/Match for this project (Total Cash + Total In-Kind)
   3. Total Project Income (Total Cost Share / Match + Amount Requested from CARES)
   4. Total Project Costs / Expenses (Total Direct Costs + Total Indirect Costs)

11. Purpose of Project:
    a. Statement of Need
       i. A needs statement establishes the rationale for a project by clearly identifying the gap or problem within a specific community. A needs statement should determine the focus an organization will take by addressing the particular needs of a specific target audience through a very distinct project.
    b. Support for this project:
       i. Data / metrics / statistics
       ii. Success from similar programs
          1. Are there other projects similar to this proposed project that have already been funded by CARES Act Funding in other places?
             a. This is where you can include a short list of the existing CARES projects that inspired this project from the www.CARESforMusic.com ***Case Studies Database of Existing CARES Program Frameworks***
             b. or other sources with citations and links.
             c. Here you can also disclose any research you did to discover the lessons learned or reasons for deviations in this proposal from those projects.
    c. Project Beneficiaries:
       i. Mention the intended audience, participants and community that will benefit from this program and how. This can include:
          1. Individuals
          2. Artists (non-LLC or Sole Proprietors)
          3. Residents (non-artists)
          4. Businesses / For-Profit
          5. Venues
          6. Creative Industry Businesses and Agencies
          7. Artist-owned Businesses/LLC's/Sole-Proprietorships
          8. Healthcare
          9. Housing
          10. Infrastructure

11. Non-Profit
12. Cultural Agencies
13. Healthcare Agencies
14. Housing Agencies
15. Infrastructure
16. Public Sector
17. Municipally-owned assets (auditoriums, parks, etc.)
18. Public Infrastructure

12. Project Title
    a. Assign a short and descriptive title for the project
13. Project Category
    a. What categories does this project cover?
        i. Grants
        ii. Infrastructure Investment
        iii. Professional or Workforce Development Program
        iv. Event
        v. Tourism, Marketing or Place Marketing
        vi. Economic Impact Assessment
        vii. Asset Inventory Mapping
        viii. Business Incubation
        ix. Education
14. Program Objectives
    a. Keep this as brief as possible but this is a good place to refer back to how this project is addressing the CARES Act eligibility requirements:
        i. How is this relief (project) necessary due to the COVID public health emergency?
            1. Provide applicable data from the www.CARESforMusic.com ***Evidence & Data of the Economic Impact of Music in Your Community***
            2. to justify the project with CARES Act Funding.
            3. Utilize any local data you have to support the project's statement of need. Such as:
                a. ROI
                b. Enterprise Value
                c. Local Revenue per Job
                d. Local Tax Revenue
                e. State Tax Revenue
                f. Estimated Hotel Occupancy Tax Revenue
                g. Special District Taxes
                h. State or Local Tax Incentive Incomes Activated
        ii. Explain how this project is currently not budgeted with the Agency of Request, Partners or Allocation Agency of Request however all project costs are incurred during the period that begins on March 1, 2020, and ends on December 30, 2020.

        1. Consider adding here why this project is not budgeted already but is a necessity for relief from COVID-19. You can also provide a copy of any current local or state budget as approved by that body as an attachments.
        2. Some examples:
            a. This project helps to diversify earning potential through professional development or training for recipients to be more resilient.
            b. This project provides a grant to these small businesses it serves, such as music venues, much in the same way other small business grant programs have seen success in other industries.
            c. This project is designed to capture data that is often difficult to track given the nature of the industry but will help to inform more intentional investments beyond the pandemic for increased sustainability and better outcomes for these industries that are typically understudied and thus underserved.
        3. Describe in narrative form how the resources are allocated how the partner organizations can guarantee that the funds will be spent by December 30, 2020.
            a. Provide any documentation, including any cost estimates, invoices, scopes of work, from the budget.

15. Max 500 word description of project
    a. Write this section understanding that this short description will typically be used to promote the program or summarize it for state legislation memos or local government resolutions.
16. Major project activities
    a. This serves as the project narrative. However, this should not be as comprehensive as a press release. There is no need to include what CARES is, the full history of how we got here. This section should be relatively brief and no more than one page, understanding that it is supported by the other items and attachments. This should support the rest of the document, not be a stand-alone section.
17. How will you ensure the project is equitable, diverse and inclusive?
    a. This is a big one and can be a great opportunity to stand up partners who excel in this practice or talk about previous project approaches that were successful.
    b. Any quotes or experiences that can be briefly shared here would be a good addition.
    c. Specifically describe how you will achieve this.
18. How will the program be promoted?
    a. Briefly describe your plans for promoting and/or publicizing the project.
    b. Include websites, social media accounts, traditional media, partners, etc.
19. Who will benefit from this project?

        a. Include information on specific age ranges, neighborhoods, geographical areas, cultures, ethnicities, industries, etc.

20. Project Performance Metrics and Reporting
    a. How will you measure the success of your project?
        i. Describe any plans you have for program evaluation, for working collaboratively with researchers, strategic consultants, program evaluators, and/or any other plans for performance measurement related to the project.
        ii. What benchmarks will be used?
        iii. How will you measure return on investment?
        iv. How will jobs created or maintained be counted?
        v. How will tax revenue be measured?
    b. Beneficiary Data Collection
        i. What kind of data will this project collect from beneficiaries? For example:
            1. How many full-time jobs does the beneficiary provide?
            2. How many jobs does the beneficiary employ part-time?
            3. Was your business profitable last year (Jan 2019-December 2019)?
21. Attachments to include:
    a. Cover Letter
    b. Letters of Support
    c. Budgets
    d. Resolution Template
    e. Photos, Videos, etc.
    f. Work Samples
    g. Marketing Materials or Graphics for this Project
    h. Previous Marketing Materials or Graphics

SAMPLE ELIGIBILITY FRAMEWORK

The below is based on a sample program for small business grants in Louisiana but is a good exercise to consider for your own project eligibility requirements. If you need more ideas, consult the www.CARESforMusic.com ***Case Studies Database of Existing CARES Program Frameworks.***

Sample questions to determine eligibility:

- Did your business exist as of March 1, 2020?
- Did you suffer an interruption of business due to COVID-19?
- Is at least 50% of your business owned by one or more state residents?

- Did you file taxes in this state in 2018 or 2019 or will file taxes in 2020, if formed on or after January 1, 2020?
- Did you have no more than 50 full-time employees as of March 1, 2020?
- Do you have customers or employees visit a physical location?
- Are you not part of a bigger business with more than 50 full-time workers?
- Does your business not exist for the purpose of advancing partisan political activity and does not directly lobby federal or state officials?
- Does your business not derive income from passive investments without active participation in business operations?
- Has your business not received other federal funding such as the Paycheck Protection Program loan, an Economic Injury Disaster Loan or other COVID-19-related relief?